

Employee Training

The employer must provide effective initial training and retraining as necessary and must certify that such training has been given to all employees covered by the standard. The certification must contain each employee's name and dates of training.

For the purposes of the standard, there are three types of employees—authorized, affected and other. The amount and kind of training that each employee receives is based upon 1. the relationship of that employee's job to the machine or equipment being locked or tagged out and 2. the degree of knowledge relevant to hazardous energy that he or she must possess. For example, the employer's training program for authorized employees (those who are charged with the responsibility for implementing the energy control procedures and performing the servicing or maintenance) must cover, at a minimum, the following areas:

- recognition of applicable hazardous energy sources,
- details about the type and magnitude of the hazardous energy sources present in the workplace, and
- the methods and means necessary to isolate and control those energy sources (i.e., the elements of the energy control procedures).

By contrast, affected employees (usually the machine operators or users) and all other employees need only be able to 1. recognize when the control procedure is being used and 2. understand the purpose of the procedure and the importance of not attempting to start up or use the equipment that has been locked or tagged out.

Because an "affected" or "other" employee is not performing the servicing or maintenance, that employee's responsibilities under the energy control program are simple: Whenever there is a lockout or tagout device in place on an energy-isolating device, the affected or other employee must leave it alone and not attempt to energize or operate the equipment.

Every employee training program must ensure that all employees understand the purpose, function and restrictions of the energy control program and that authorized employees possess the knowledge and skills necessary for the safe application, use and removal of energy controls.

Training programs for authorized employees to comply with this standard, which is performance-oriented, should deal with the equipment, type(s) of energy, and hazard(s) specific to the workplace being covered.

Retraining must be provided, as required, whenever there is a change in job assignments, a change in machines, equipment or processes that present a new hazard, or a change in energy control procedures. Additional retraining must be conducted whenever a periodic inspection reveals, or whenever the employer has reason to believe, that there are deviations from or inadequacies in the employee's knowledge or use of the energy control procedure.

Periodic Inspections

A periodic inspection of each procedure, when usage is at least once a year, must be performed at least annually to ensure that the energy control procedures continue to be implemented properly and that the employees are familiar with their responsibilities under those procedures. The periodic inspections must be designed to correct any deviations or inadequacies observed. An authorized employee other than the one(s) using the energy control procedure must perform the periodic inspections. In addition, the employer must certify that the periodic inspections have been performed. The certification must identify the machine or equipment on which the energy control procedure was used, the date of the inspection, the employees included in the inspection, and the name of the person performing the inspection. For a lockout procedure, the periodic inspection must include a review, between the inspector and each authorized employee, of that employee's responsibilities under the energy control procedure being inspected. When a tagout procedure is inspected, a review on the limitation of tags, in addition to the above requirements, must also be included with each affected and authorized employee.